

# InterscopePlus User Manual

(Primavera Integration - Release 2.0)

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### Revision History:

- 1.0 – 07/06/2016 – first release for Interscope Version X2.0
- 2.0 – 07/25/2016 – updated for Interscope Version X2.4

## I. Overview

Interscope was originally created in 1999 for the State Construction Office for internal use in tracking projects as they moved through the office. In 2012, the decision was made to incorporate the functionality of the University System’s “CAPSTAT” Capital Project Status software into Interscope, and then further to create a state-wide Capital Project System that would be used by the University System, Community College System, and all State Agencies. InterscopePlus is now that system. Screen representations shown throughout this manual currently reflect the Interscope system label.

Interscope is designed to track the life cycle of Capital Projects from the time they are authorized until they are closed out, including funding sources and HUB data. It is not intended to be an accounting system.

Oracle’s Primavera P6 Enterprise Project Portfolio Management is a powerful, robust and easy-to-use solution for prioritizing, planning, managing and evaluating projects, programs and portfolios. It is a cloud based “Software As a Service” (SaaS) solution providing a 100% web-based solution for managing projects of any size, adapts to varying levels of complexity across projects and intelligently scales to meet the needs of all roles, functions, or skill levels in an organization.<sup>1</sup>

This addendum to the User Manual covers the linking, update and synchronization of schedule milestones between the State Construction Office Interscope System and the University of North Carolina General Administration’s cloud-based Primavera P6 system.

Specifically, it addresses the following features:

1. Linking an unlinking Interscope projects and Primavera schedules
2. Mapping milestones between the systems
3. Updating and synchronizing Primavera milestone planned dates
4. Updating and synchronizing Interscope milestone actual dates
5. The capture of Primavera cost information
6. Background batch updating

The intended user base for these features are the project managers responsible for project schedules who are involved with Interscope capital improvement projects.

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<sup>1</sup> “Oracle’s Primavera P6 Enterprise Project Portfolio Management – Data Sheet”

## I. Getting started

Interscope Version 2 now includes features for linking to schedules that exist in a Primavera P6 Project scheduling system. The integration works in the following manner:

- Milestone Planned dates flow from Primavera to Interscope
- Milestone Actual dates flow from Interscope to Primavera
- Interscope “pushes” actual dates to Primavera schedule milestone activities as they occur
- Interscope “pulls” Primavera milestone activity planned dates based upon user actions. (Additionally, an Interscope batch job runs periodically to keep Interscope projects and Primavera schedules synchronized with up-to-date information.)

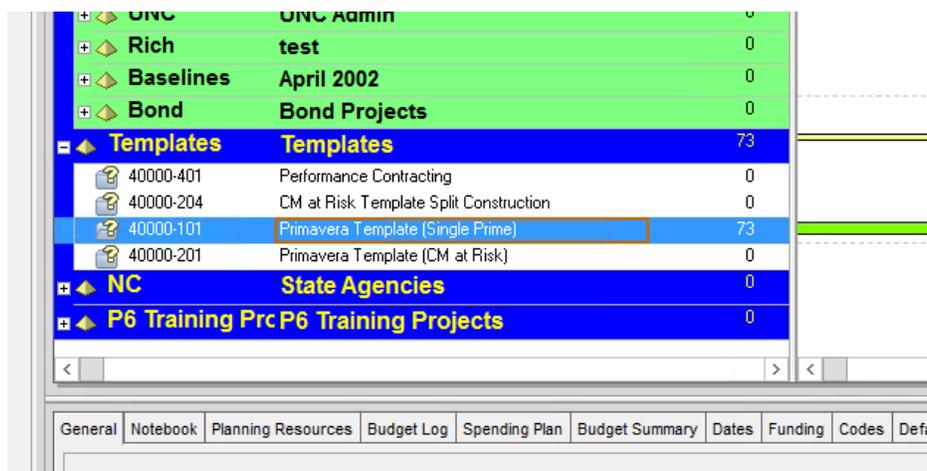
Prerequisites for establishing the linkage between an Interscope project and its associated Primavera schedule include the following:

1 – The Primavera P6 schedule must reside in the Primavera P6 Enterprise system hosted by the University of North Carolina General Administration. This is the only Primavera P6 system that Interscope currently supports.

(To obtain information about licensing and user accounts for this system, please contact Lindsay Noth at [lmnoth@northcarolina.edu](mailto:lmnoth@northcarolina.edu).)

2 – The Primavera P6 project schedule must be created using the custom UNC GA templates.

These reside in the “Templates” section in UNC GA Primavera P6 system:



The templates contain the custom columns that enable the integration of the two systems:

at	At Completion Total Cost	Latest iPlus Update	UNC Milestones	^
\$0	\$0			
\$0	\$0			
\$0	\$0			
\$0	\$0		DESADVPRJ	
\$0	\$0			
\$0	\$0			
\$0	\$0			
\$0	\$0		DESSELDC	
\$0	\$0			

- UNC Milestone
  - the common milestone code for the P6 activity and Interscope date which is used to link and update planned and actual dates between the systems.
- Latest IPlus Update
  - date of the last update/synchronization from Interscope. This date is updated for each activity when an update is triggered from Interscope.

3 – The P6 schedule must be “Active”. Interscope will ignore all schedules that have been closed. These will not be visible in the Interscope P6 project listing displayed for linking.

### II. The Integration Process

Once the P6 schedule has been created using the correct template and an associated Interscope project exists, integration can then be started.

Setup steps are as follows:

1. Make sure that the P6 schedule data is up-to-date and a schedule operation has been performed.
2. Access the Interscope Project and navigate to the **Primavera Link** tab
3. Link the Interscope Project to the Primavera schedule
4. Manually link any required milestones that were not “auto-mapped” during the linking operation
5. Manually link any other optional milestones as desired.
6. Synchronize the two systems

Steps to perform on an ongoing basis during the project’s life cycle:

1. As project data is entered into Interscope - for example as design reviews are completed and contracts committed – manually map the milestones, update actual dates and perform synchronization as needed.

**NOTE:**

*Even though milestones may exist in the linked P6 schedule for future activities that have yet to be recorded as actual events in Interscope, these activities ARE NOT mapped to milestones in Interscope until the actual data is available for linking. At that time the user must manually map the milestones.*

## III. Interscope projects linked to Primavera

The Interscope Project search page has been extended to support searching for P6 linked projects.

Searches can now be performed using the criteria listed in the **Primavera P6 Information** section on the search page:

The screenshot displays the Interscope Project Search interface. At the top, the header shows 'InterSCOPE :: State Of North Carolina - State Construction Office', 'USER: mgioielli', and 'VIEW: State Construction'. A navigation bar includes links for Home, System, Users, Companies, New, FCAP, Design Review, Authorizations, Programs, Funds Change Request, My Account, Reports, and Help.

The main search area is divided into three sections:

- Project Information:** Includes dropdowns for Department (Educational Institutions (Universities)), Institution/Agency, Within Program ID, Project ID, Project Type, Special Project Designation, Agency Project Code, Hub Only?, Status (Active), and SCO Oversight.
- Funding Information:** Includes dropdowns for Budget Code, Budget Item, NCAS Center, and Year Funded. It also provides links for help: Project Types Table and Project Type State Construction Manual. General Statutes are listed as GS 143-129, GS 116-31-11, GS 116-40.6, GS 116-37, and GS 115D-9.
- Primavera P6 Information:** Includes a 'Linked to P6?' dropdown (Yes), and input fields for P6 Project ID and P6 Project Name.

Below the filters are buttons for Search, Done, Reset, and Add a New Project. A table displays search results:

	Project ID	Project Title	Status	Program ID	Program Name	Institution / Agency	Funded By Code-Item-Center	Agency Project Code	Act
1	<a href="#">SELECT</a> 6744	College of Education Building - (6744)	Active	11253	[40772-3011 - College of Education	Appalachian State	Multiple	200	\$
2	<a href="#">SELECT</a> 14273	Steam Phase 8B - Dabney Hall leg	Active	12442	2015-16 Repair and Renovations -	NC State University	41524-360	201620006	

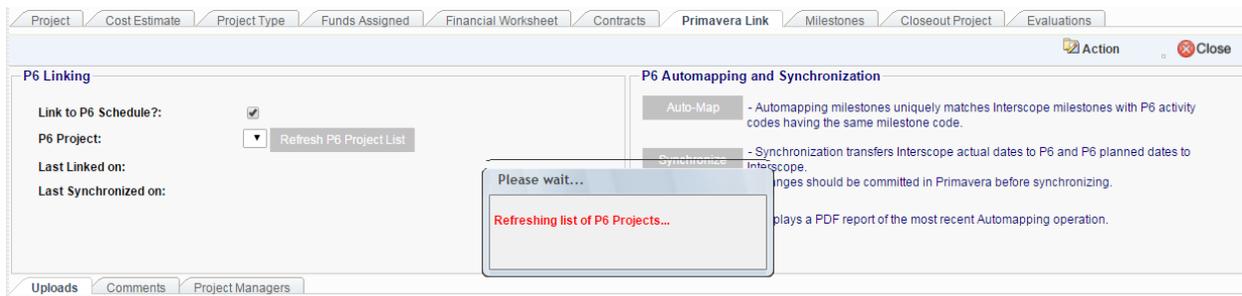
At the bottom, it indicates '2 found' and includes an 'Export' button. The footer shows the date '7/6/2016 10:16:36 AM', the version 'InterscopePlus X2.0\_20160701', and copyright information for 2016.

## II. Linking projects to schedules

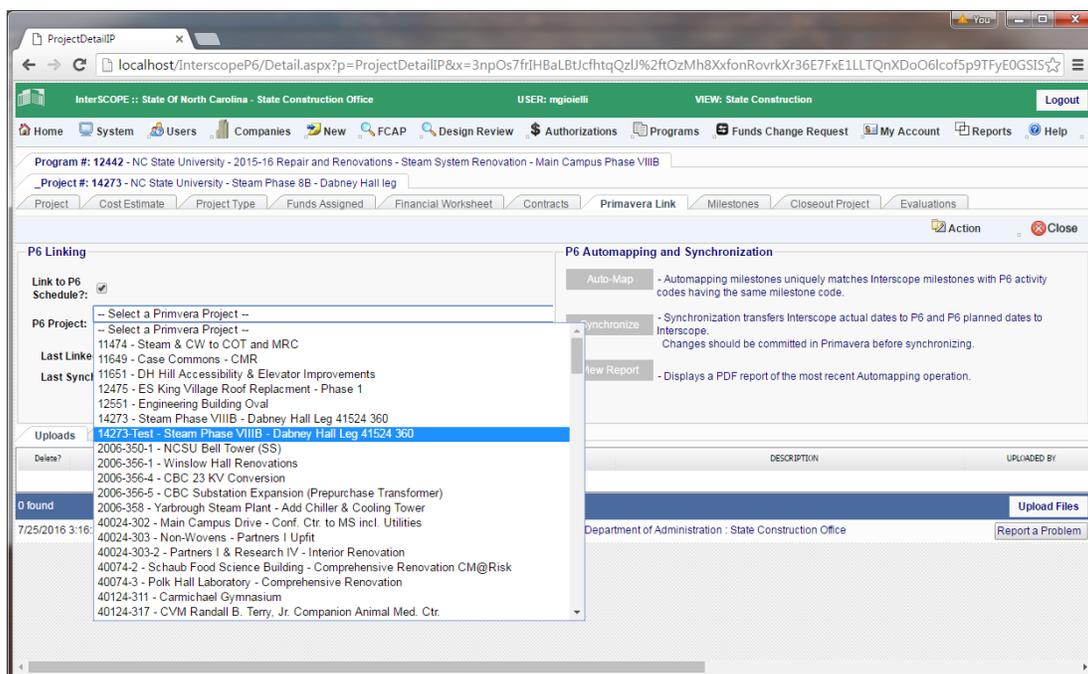
Once the P6 schedule has been created in Primavera, it can now be linked to its associated Interscope project. The **Primavera Link** tab under the **Project detail** screen has been designed for this purpose.

To link an Interscope project to its P6 schedule, check the **Link to P6 Schedule?** checkbox. (Note: Only users with “Primavera Link” permission will see the “Link” checkbox and schedule dropdown.)

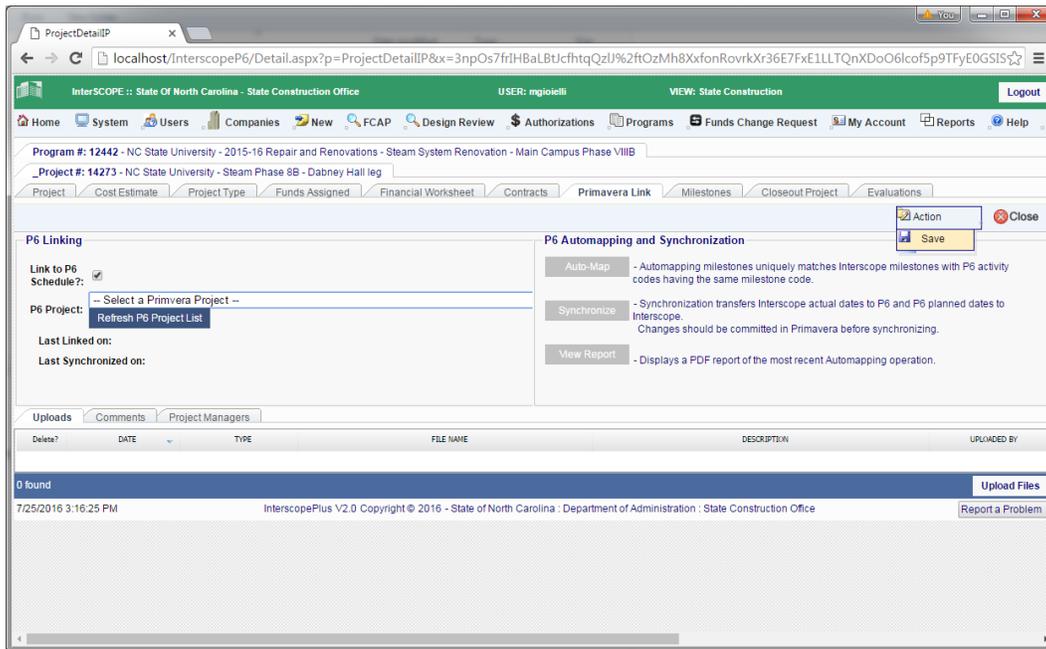
Interscope will then activate the P6 Project dropdown list showing the active P6 schedules that have not yet been linked to an Interscope project for this organization (agency or institution). These will be the schedules listed under the P6 EPS node defined for the given agency or institution. (Note: Interscope associates an agency/institution with its defined EPS node in P6).



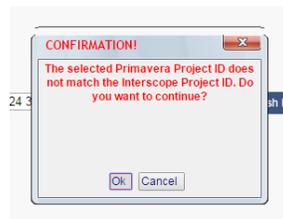
The following example displays the active NC State P6 schedules that have not been linked to Interscope projects:



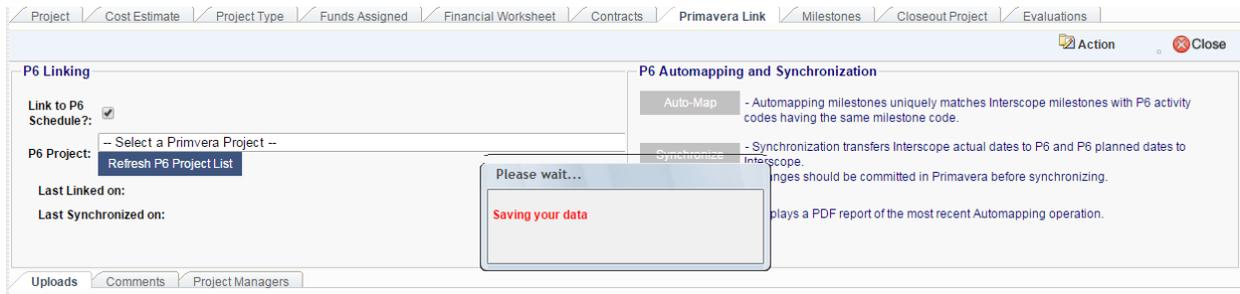
To link the project and schedule, select the **Save** option under the **Action** menu.



Interscope will check the SCO Project ID (Project Sequence #) for a match against the selected P6 Project Name. If a match is not found, Interscope will prompt the user to confirm the link operation:



During the save operation, Interscope accesses the P6 schedule in Primavera and “automaps” (matches) P6 activities and Interscope dates based on a list of defined milestone codes. (See Appendix A for a list of milestone codes)



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Interscope will only “automap” actual dates with P6 milestone activities when it finds an unambiguous match - for example, if there is only one “**Designer Selection approved by Owner Agency**” milestone (DESSELDC).

Therefore, it is not unusual on a large project with multiple design or construction contracts to have fewer milestones automatically mapped. For these projects, the project manager must manually map the milestones based on their knowledge of the project schedule.

At the completion of the automap operation, a summary of the milestones that Interscope was able to map are displayed to the user.

This information is also recorded in detail in the Automapping report that can be viewed after each automap operation by clicking on the **View Report** button.

The screenshot displays the InterscopePlus web application interface. At the top, the header shows the user is logged in as 'mgioielli' and is viewing the 'State Construction' page. A navigation menu includes options like Home, System, Users, Companies, New, FCAP, Design Review, Authorizations, Programs, Funds Change Request, My Account, Reports, and Help. A prominent yellow notification box in the center reads: 'Automap finished', '0 milestones were previously mapped.', '12 new milestones were mapped.', '1 P6 activities with milestones were not mapped.', 'Automap report has been generated.', 'Click on 'View Report' for details.', and 'Primavera link updated successfully.' Below this, the breadcrumb trail shows the current project: 'Program #: 12442 - NC State University - 2015-16 Repair and Renovations - Steam System Renovation - Main Campus Phase VIII B' and 'Project #: 14273 - NC State University - Steam Phase 8B - Dabney Hall leg'. The main content area is divided into two panels. The left panel, 'P6 Linking', has a 'Link to P6 Schedule?' checkbox checked and a text field containing '14273-Test - Steam Phase VIII B - Dabney Hall Leg 41524 360'. It also shows 'Last Linked on: 7/25/2016 3:42:39 PM' and a 'Last Synchronized on:' field. The right panel, 'P6 Automapping and Synchronization', contains three buttons: 'Auto-Map' (description: 'Automapping milestones uniquely matches Interscope milestones with P6 activity codes having the same milestone code.'), 'Synchronize' (description: 'Synchronization transfers Interscope actual dates to P6 and P6 planned dates to Interscope. Changes should be committed in Primavera before synchronizing.'), and 'View Report' (description: 'Displays a PDF report of the most recent Automapping operation.').

## Interscope Primavera Automapping Report

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**Interscope Project Sequence:** 14273  
**Interscope Project Title:** Steam Phase 8B - Dabney Hall leg  
**P6 Project ID:** 14273-Test  
**P6 Project Name:** Steam Phase VIII B - Dabney Hall Leg 41524 360  
  
**Run Date:** 7/25/2016 3:50:32 PM

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**The following milestone mappings already exist:**

No milestones were previously mapped.

**The following new milestones mappings have been created:**

Activity Code	Activity Name	Milestone	Planned Date	Interscope Entity
A140	Designer Selected Milestone	DESSELD	1/20/2011	UNI_SELECTION_DATE
A240	Design Contract Milestone	DESCONDC	4/28/2016	DATE_SIGN_AGENCY
A100	Designer Advertise Milestone	DESADVPRJ	7/7/2015	
D170	Project Closeout Milestone	CLOSEPRJ	6/8/2017	FIN_CLOSEDOUT_DATE
A625	CD Submittal to SCO Milestone	CDSSCOPKG	5/4/2016	CD_DATE
B100	Advertisement Milestone	ADVBIDPRJ	5/17/2016	BID_ADVERTIZED_DATE
B120	Bid Opening Milestone	BIDOPENPKG	6/9/2016	PROJECTED_BID_DATE
B140	Award Letter Milestone	AWDLTRPKG	6/20/2016	AWARD_DATE
C100	Notice to Proceed Milestone	NTPPKG	6/30/2016	CONST_START_DATE
C140	Beneficial Occupancy Milestone	BENOCCKG	12/12/2016	BEN_OCCUP
D180	Final report submission to SCO	FRSSCOPKG	2/9/2017	FINAL_REC_DATE
D200	Final report approved by SCO	FRASCOPKG	4/10/2017	FINAL_REC_APR_DATE

**The following Primavera activities were not able to be mapped:**

Activity Code	Activity Name	Milestone	Activity Type	Reason
A655	CD Final Approval Milestone	CDFINAL	FinishMilestone	No Interscope Milestone found.

## Interscope Primavera Automapping Report

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### Explanation of reasons:

#### **Multiple Interscope milestones –**

The Interscope project consists of multiple design phases, contracts and/or multiple construction contracts each having the same set of milestones. In this situation, the Interscope Automapper cannot determine which milestone should be mapped to the corresponding P6 Activity with the same milestone. These mapping must be done manually based on an understanding of the project schedule.

#### **No Interscope Milestone found –**

The P6 schedule contains milestones that are not found in the set of common milestones defined for both systems.

Refer to the *"Interscope Primavera Integration User Manual"* under the **Help** option on the main Interscope menu for a list of the common milestone codes.

## IV. Mapping milestones manually

Milestones that exist in the Primavera schedule with defined UNC milestone codes (see the P6 “UNC Milestones” column) that are not automatically mapped during the linking process must be manually mapped between the systems before synchronization can occur.

Only users with “*Primavera Link*” permission can perform mapping activities – in either “auto” or “manual” mode.

To update milestone mappings, navigate to the **Milestone** tab in each level of the Interscope project hierarchy – Project, Design Contract, Package and Construction Contract.

Check the **Show Primavera Detail** checkbox to expose the links used to change milestone mappings.

Milestones required by Interscope are highlighted in gray in the display.

Milestones that are not mapped show no values in the **P6 Activity** and **P6 Activity Name** columns.

This example manually maps the **Date of FIRST advertisement for designer** to its associated Activity in the P6 schedule (A100).

To link or change a milestone mapping between the two systems, click on **change**.

The screenshot shows the 'Milestones' tab in the Primavera software. It displays project information for '14273 - NC State University - Steam Phase 8B - Dabney Hall leg'. Below this is a table titled 'Project Milestones' with columns for PHASE, MILESTONE NAME, PLANNED, ACTUAL, Milestone Code, P6 Activity, P6 Activity Name, and Change P6 Activity. The first row, 'Date of FIRST advertisement for designer', is highlighted in gray and mapped to P6 Activity 'A100' with the name 'Designer Advertise Milestone'. Other milestones like 'Date of advertisement for commissioning authority', 'Execute Commissioning Contract', and 'Advertise for CM at Risk' are also listed but not mapped. The 'PROJECT CLOSEOUT' milestone is mapped to P6 Activity 'D170' with the name 'Project Closeout Milestone'. A note at the bottom states: 'Note: Highlighted row indicates a milestones required for P6 Integration.' Buttons for 'Synchronize Dates with Primavera' and 'Export All Milestones' are visible at the bottom.

PHASE	MILESTONE NAME	PLANNED	ACTUAL	Milestone Code	P6 Activity	P6 Activity Name	Change P6 Activity
ADVERTISEMENT	Date of FIRST advertisement for designer	7/7/2015	/ /	DESADVPRJ	A100	Designer Advertise Milestone	<a href="#">change</a> <a href="#">unlink</a>
	Date of advertisement for commissioning authority		/ /	CXADVPRJ			<a href="#">change</a> <a href="#">unlink</a>
	Execute Commissioning Contract		/ /	CXCONPRJ			<a href="#">change</a> <a href="#">unlink</a>
	Advertise for CM at Risk		/ /	CMADVPRJ			<a href="#">change</a> <a href="#">unlink</a>
PROJECT CLOSEOUT	Project Closeout	6/8/2017		CLOSEPRJ	D170	Project Closeout Milestone	<a href="#">change</a> <a href="#">unlink</a>

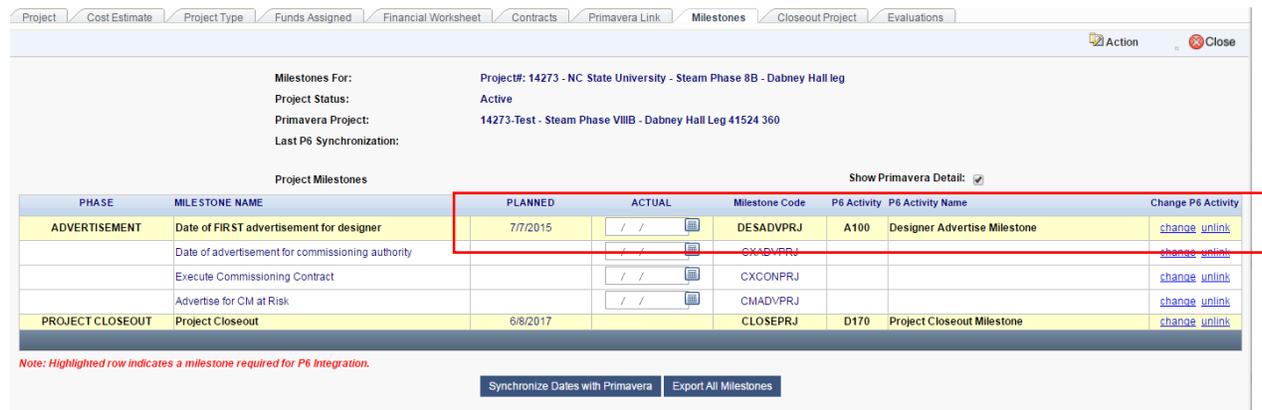
Note: Highlighted row indicates a milestones required for P6 Integration.

Synchronize Dates with Primavera    Export All Milestones

A search page is displayed showing the activities in the linked P6 schedule that exist for the selected milestone.



Clicking on **SELECT** will dismiss the search feature linking the selected Activity to the Milestone.



In this example, we’ve mapped activity code **A100 – Designer Advvertise Milestone** to the **DESADVPRJ** milestone. In addition, the Planned date for this activity (7/1/2015) was “pulled” from the P6 schedule and stored in Interscope.

To unlink a linked milestone, simply click on **unlink** and the **P6 Activity** and **P6 Activity Name** columns will be cleared indicating that the milestone link between the system has been removed.

## V. Updating milestone actual dates

To view and update milestone dates, navigate to the **Milestone** tab in each level of the Interscope project hierarchy – Project, Design Contract, Package and Construction Contract.

Project Type / Funds Assigned / Financial Worksheet / Contracts / Primavera Link / **Milestones** / Closeout Project / Evaluations

Milestones For: Project#: 14273 - NC State University - Steam Phase 8B - Dabney Hall leg  
 Project Status: Active  
 Primavera Project: 14273-Test - Steam Phase VIII B - Dabney Hall Leg 41524 360  
 Last P6 Synchronization:

Project Milestones Show Primavera Detail:

PHASE	MILESTONE NAME	PLANNED	ACTUAL
ADVERTISEMENT	Date of FIRST advertisement for designer	7/7/2015	/ /
	Date of advertisement for commissioning authority		/ /
	Execute Commissioning Contract		/ /
	Advertise for CM at Risk		/ /
PROJECT CLOSEOUT	Project Closeout	6/8/2017	

*Note: Highlighted row indicates a milestone required for P6 Integration.*

Clicking on the “**Show Primavera Detail**” checkbox will show an expanded display of the P6 activities that have been mapped.

Project / Cost Estimate / Project Type / Funds Assigned / Financial Worksheet / Contracts / Primavera Link / **Milestones** / Closeout Project / Evaluations

Action Close

Milestones For: Project#: 14273 - NC State University - Steam Phase 8B - Dabney Hall leg  
 Project Status: Active  
 Primavera Project: 14273-Test - Steam Phase VIII B - Dabney Hall Leg 41524 360  
 Last P6 Synchronization:

Project Milestones Show Primavera Detail:

PHASE	MILESTONE NAME	PLANNED	ACTUAL	Milestone Code	P6 Activity	P6 Activity Name	Change P6 Activity
ADVERTISEMENT	Date of FIRST advertisement for designer	7/7/2015	/ /	DESADVPRJ	A100	Designer Advertise Milestone	<a href="#">change</a> <a href="#">unlink</a>
	Date of advertisement for commissioning authority		/ /	CXADVPRJ			<a href="#">change</a> <a href="#">unlink</a>
	Execute Commissioning Contract		/ /	CXCONPRJ			<a href="#">change</a> <a href="#">unlink</a>
	Advertise for CM at Risk		/ /	CMADVPRJ			<a href="#">change</a> <a href="#">unlink</a>
PROJECT CLOSEOUT	Project Closeout	6/8/2017		CLOSEPRJ	D170	Project Closeout Milestone	<a href="#">change</a> <a href="#">unlink</a>

*Note: Highlighted row indicates a milestone required for P6 Integration.*

If an actual date field can be updated manually, it will be displayed in updated mode. All actual dates maintained and created automatically by Interscope will be displayed in read-only mode and cannot be updated by the user.

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Enter the dates and select **Action-> Save**.

Project Type / Funds Assigned / Financial Worksheet / Contracts / Primavera Link / **Milestones** / Closeout Project / Evaluations

Milestones For: Project#: 14273 - NC State University - Steam Phase 8B - Dabney Hall leg  
 Project Status: Active  
 Primavera Project: 14273-Test - Steam Phase VIII B - Dabney Hall Leg 41524 360  
 Last P6 Synchronization:

Project Milestones Show Primavera Detail:

PHASE	MILESTONE NAME	PLANNED	ACTUAL
ADVERTISEMENT	Date of FIRST advertisement for designer	7/7/2015	07/07/2015
	Date of advertisement for commissioning authority		/ /
	Execute Commissioning Contract		/ /
	Advertise for CM at Risk		/ /
PROJECT CLOSEOUT	Project Closeout	6/8/2017	

*Note: Highlighted row indicates a milestone required for P6 Integration.*

Synchronize Dates with Primavera    Export All Milestones

During the Save operation, if actual dates are changed in Interscope, these changes will be reflected in P6 at the time they are saved in Interscope.

The date of this update from Interscope is also recorded in the “Latest IPlus Update” column in the P6 schedule for the updated P6 Activity (milestone) for auditing purposes.

In this example, on July 1<sup>st</sup>, the actual date for the Designer Advertise Milestone was entered as 7/7/15.

The “A” suffix next to the date indicates that this is an actual date for the milestone activity in P6.

Activities | Projects

Layout: Integration Layout    Filter: All Activities

Activity ID	Activity Name	Start	Finish	Planned Start	Planned Finish	Budgeted Total Cost	At Completion Total Cost	Latest IPlus Update	UNC Milestones
14273-Test	Steam Phase VIII B - Dabney Hall Le	03-Nov-10 A	08-Jun-17	18-Jan-11	08-Jun-17	\$0	\$0	01-Jul-16	
14273-Test.1	Design	03-Nov-10 A	04-Jul-16 A	18-Jan-11	04-Jul-16	\$0	\$0	01-Jul-16	
14273-Test.1.1	Designer Selection	03-Nov-10 A	04-Apr-16 A	18-Jan-11	11-Aug-15	\$0	\$0	01-Jul-16	
A100	Designer Advertise Milestone	07-Jul-15 A		01-Jul-15		\$0	\$0	01-Jul-16	DESADVPRJ
A110	Advertisement for Designer	09-Nov-10 A	01-Dec-10 A	01-Jul-15	28-Jul-15	\$0	\$0		
A120	Shortlist Designers	13-Dec-10 A	13-Dec-10 A	29-Jul-15	11-Aug-15	\$0	\$0		
A130	Designer Interviews	18-Jan-11 A	18-Jan-11 A	18-Jan-11	18-Jan-11	\$0	\$0		
A140	Designer Selected Milestone		04-Apr-16 A		20-Jan-11	\$0	\$0	01-Jul-16	DESSELDC

**NOTE:** Any changes in the P6 planned dates are not automatically updated in Interscope during this operation. This action requires the user to initiate a “synchronization” between the 2 systems which will synchronize ALL milestones between the two systems (see next section).

## VI. Synchronizing milestones between the systems

Users with “Primavera Update” permission will see a “Synchronize Dates with Primavera” button on the **Milestones** tab.

Project Type / Funds Assigned / Financial Worksheet / Contracts / Primavera Link / **Milestones** / Closeout Project / Evaluations

Milestones For: Project#: 14273 - NC State University - Steam Phase 8B - Dabney Hall leg  
 Project Status: Active  
 Primavera Project: 14273-Test - Steam Phase VIII B - Dabney Hall Leg 41524 360  
 Last P6 Synchronization:

Project Milestones Show Primavera Detail:

PHASE	MILESTONE NAME	PLANNED	ACTUAL
ADVERTISEMENT	Date of FIRST advertisement for designer	7/7/2015	07/07/2015
	Date of advertisement for commissioning authority		/ /
	Execute Commissioning Contract		/ /
	Advertise for CM at Risk		/ /
PROJECT CLOSEOUT	Project Closeout	6/8/2017	

*Note: Highlighted row indicates a milestone required for P6 Integration.*

This operation synchronizes ALL milestones across the entire project hierarchy (Project, Design Contract, Package, Construction Contract).

Interscope actual dates are “pushed” to all linked P6 milestone activities and planned dates are “pulled” into Interscope from all P6 milestone activities.

Project Type / Funds Assigned / Financial Worksheet / Contracts / Primavera Link / **Milestones** / Closeout Project / Evaluations

Milestones For: Project#: 14273 - NC State University - Steam Phase 8B - Dabney Hall leg  
 Project Status: Active  
 Primavera Project: 14273-Test - Steam Phase VIII B - Dabney Hall Leg 41524 360  
 Last P6 Synchronization:

Project Milestones Show Primavera Detail:

PHASE	MILESTONE NAME	PLANNED	ACTUAL
ADVERTISEMENT	Date of FIRST advertisement for designer	7/7/2015	07/07/2015
	Date of advertisement for commissioning authority		/ /
	Execute Commissioning Contract		/ /
	Advertise for CM at Risk		/ /
PROJECT CLOSEOUT	Project Closeout	6/8/2017	

**CONFIRMATION!**

You are about to update **PLANNED** dates in Interscope from Primavera and **ACTUAL** dates in your Primavera schedule from Interscope. Make sure you have committed your changes in Primavera before you continue. Continue now?

*Note: Highlighted row indicates a milestone required for P6 Integration.*

## I. Unlinking projects from Primavera

To unlink a project from a P6 schedule, uncheck the “Link to P6 Schedule”

The screenshot shows the Primavera integration interface. At the top, there are tabs for 'Program #: 12442 - NC State University - 2015-16 Repair and Renovations - Steam System Renovation - Main Campus Phase VIII B' and '\_Project #: 14273 - NC State University - Steam Phase 8B - Dabney Hall leg'. Below these are navigation tabs: 'Project', 'Cost Estimate', 'Project Type', 'Funds Assigned', 'Financial Worksheet', 'Contracts', 'Primavera Link', 'Milestones', 'Closeout Project', and 'Evaluations'. The 'Primavera Link' tab is active. On the right, there are 'Action' and 'Close' buttons. The main content area is divided into two sections: 'P6 Linking' and 'P6 Automapping and Synchronization'. The 'P6 Linking' section has a 'Link to P6 Schedule?' checkbox (unchecked), a 'P6 Project:' field with the value '14273-Test - Steam Phase VIII B - Dabney Hall Leg 41524 360', and a 'Refresh P6 Project List' button. It also shows 'Last Linked on: 7/25/2016 3:50:00 PM' and 'Last Synchronized on:'. The 'P6 Automapping and Synchronization' section has three buttons: 'Auto-Map' (with description: '- Automapping milestones uniquely matches Interscope milestones with P6 activity codes having the same milestone code.'), 'Synchronize' (with description: '- Synchronization transfers Interscope actual dates to P6 and P6 planned dates to Interscope. Changes should be committed in Primavera before synchronizing.'), and 'View Report' (with description: '- Displays a PDF report of the most recent Automapping operation.').

The user will be prompted to confirm this operation and must select from two options:

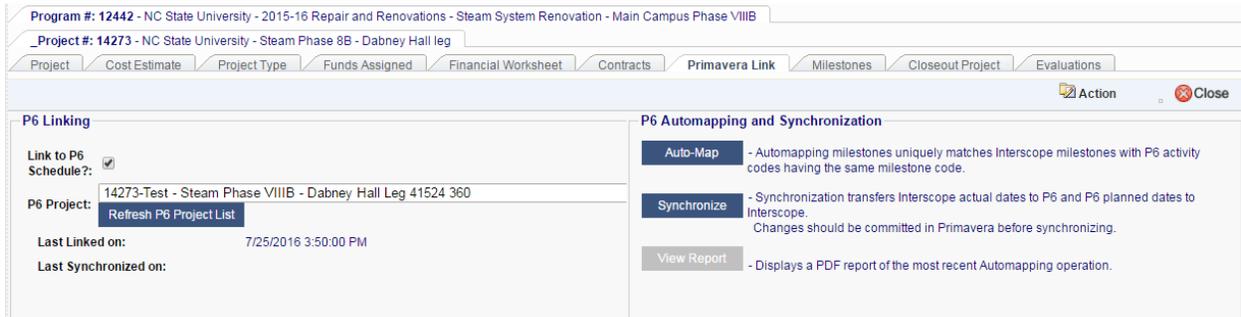
- 1 – Unlink and Save dates – All planned dates pulled from P6 will remain in Interscope
- 2 – Unlink and Remove dates – All planned dates pulled from P6 will be deleted from Interscope

The default is to unlink and save planned dates.

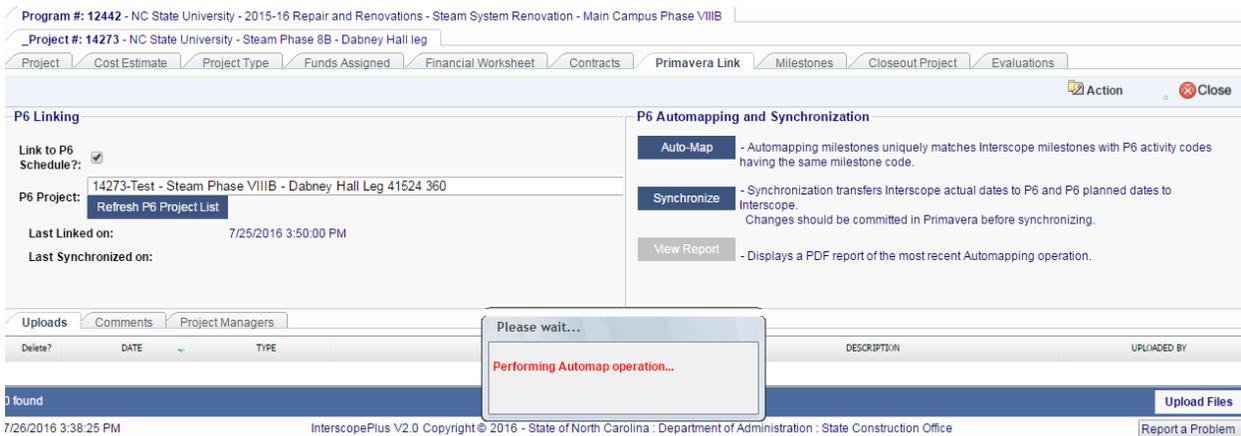


## VII. Auto-mapping milestones

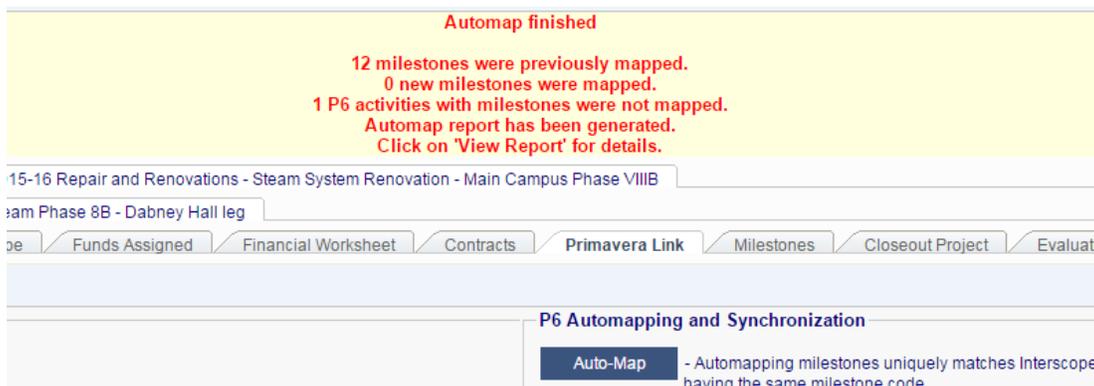
As a project progresses through its life-cycle and continues through construction and closeout, the project manager must periodically re-map milestones between the systems. This is necessary since as reviews and contracts are added to Interscope the associated milestones are created but not automatically mapped to the projects linked schedule.



To re-map (automap) milestones, use the **Auto-Map** button on the **Primavera Link** tab under the **Project detail** screen.



Automapping results are then displayed to the user:

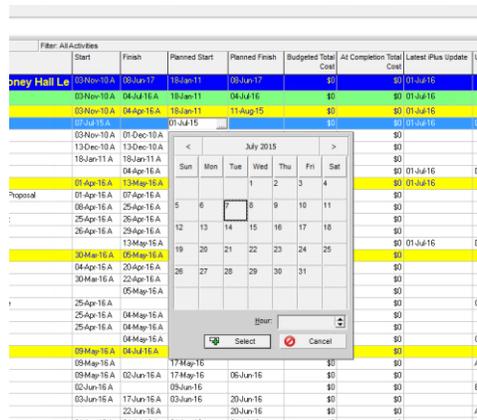


## VIII. Updating Primavera planned dates and synchronizing with Interscope

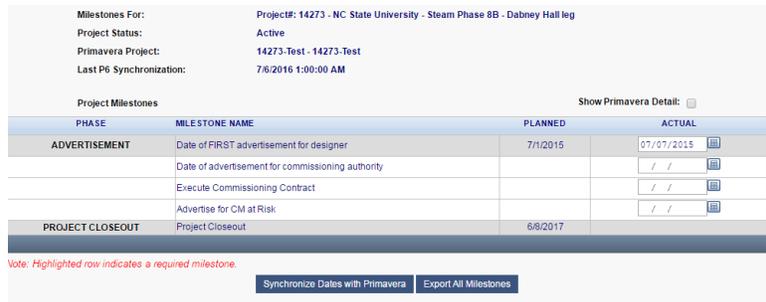
Since Primavera does not automatically update Interscope whenever the schedule is updated, the user must initiate the update from Interscope.

In this example, the Planned Start for the Designer Advertise Milestone is changed from 7/1/15 to 7/7/15.

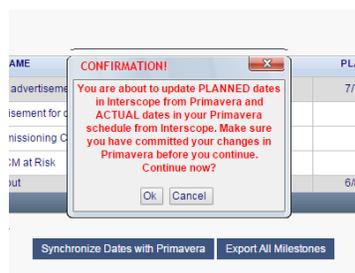
Step 1 – the User changes the date in P6



Step 2 – the User accesses the Milestone tab for the Project



Step 3 – the User clicks on “Synchronize Dates with Primavera” and receives the confirmation pop-up:



Step 4 – Upon confirmation, Interscope accesses the P6 schedule and compares and updates all linked milestones. A list of updated milestones is displayed to the user.

Planned dates have changed. The following Milestones were updated from Primavera:  
Milestone:[DESADVPRJ] Date of FIRST advertisement for designer, Activity ID: A100, Date: 7/7/2015

and Renovations - Steam System Renovation - Main Campus Phase VIIIIB  
 ↳ Dabney Hall leg  
 is Assigned | Financial Worksheet | Contracts | HUB Data | Primavera Link | **Milestones** | Closeout Project | Evaluations

Milestones For: Project#: 14273 - NC State University - Steam Phase 8B - Dabney Hall leg  
 Project Status: Active  
 Primavera Project: 14273-Test - 14273-Test  
 Last P6 Synchronization: 7/6/2016 9:52:00 AM

Project Milestones Show Primavera Detail:

PHASE	MILESTONE NAME	PLANNED	ACTUAL
ADVERTISEMENT	Date of FIRST advertisement for designer	7/7/2015	07/07/2015
	Date of advertisement for commissioning authority		// //
	Execute Commissioning Contract		// //
	Advertise for CM at Risk		// //
PROJECT CLOSEOUT	Project Closeout	6/8/2017	

Note: Highlighted row indicates a required milestone

## IX. Primavera financials

During the synchronization process, Interscope also captures the following cost fields from the Primavera schedule:

- Budgeted Total Cost
- Actual Total Cost
- At Completion Total Cost

(Note: Please reference the Primavera documentation for a description of these columns)

Activity ID	Activity Name	Start	Finish	Planned Start	Planned Finish	Budgeted Total Cost	At Completion Total Cost	Latest iPlus Update	UNC Milestones
40772-301	College of Education Building	11-Aug-06 A	05-Feb-16	11-Aug-06	12-Jun-14	\$36,250,000	\$37,270,084	01-Jul-16	
40772-301.1	Design	11-Aug-06 A	19-Oct-12 A	11-Aug-06	09-Oct-12	\$1,927,347	\$1,927,347	01-Jul-16	
40772-301.1.1	Designer Selection	11-Aug-06 A	14-Sep-06 A	11-Aug-06	14-Sep-06	\$1	\$1	01-Jul-16	
A1000	Designer Advertise Milestone	28-Aug-06 A		25-Aug-06		\$0	\$0	01-Jul-16	DESADVPRJ
A1010	Advertisement for Designer	11-Aug-06 A	05-Aug-06 A	11-Aug-06	05-Aug-06	\$1	\$1		

This information has been added to the **Financial Worksheet** and **Primavera Link** tabs for all projects that are linked to Primavera:

Program #: 11753 - Appalachian State University - [40772-301] - College of Education Building  
 Project #: 6744 - Appalachian State University - College of Education Building - (6744)

Project Cost Estimate Project Type Funds Assigned **Financial Worksheet** Contracts Primavera Link Milestones

Estimated vs Committed Contingency Expenditures - Design Expenditures - Construction Expenditures - Other

---

**Worksheet Summary**

Assigned Funds: \$36,021,020.00	Assigned Funds: \$36,021,020.00
Total Estimated Cost: \$33,814,670.00	Total Committed: \$35,776,951.20
Estimated Surplus (Need): \$2,206,350.00	Available to Commit: \$244,068.80

[Assign Funds](#)

---

**P6 Project Summary**

Budgeted Total Cost: \$36,250,000.00	Actual Total Cost: \$35,380,068.17
	At Completion Total Cost: \$37,270,083.83

---

**Worksheet Detail**

Enter Category Estimates  
 Enter Total Estimates

	Estimated Cost	Committed	
		Original Contracts	Revised Contracts
Design Fee \$:	\$ 0.00	\$ 2,136,119.00	\$ 2,899,023.00
Construction \$:	\$ 0.00	\$ 19,948,190.68	\$ 22,190,430.20
Contingency \$:	\$ 0.00		
Other \$:	\$ 33,814,670.00	\$ 10,687,498.00	\$ 10,687,498.00
<b>Total</b>	<b>\$33,814,670.00</b>	<b>\$32,771,807.68</b>	<b>\$35,776,951.20</b>

---

Link Project Milestones to P6 Schedule?

P6 Project: -- Select a Primavera Project --

Last Synchronization: 7/6/2016 1:00:00 AM

P6 Budgeted Total Cost: \$36,250,000.00

P6 Actual Total Cost: \$35,380,068.17

P6 At Completion Total Cost: \$37,270,083.83

[Links](#)
[Comments](#)
[Project Managers](#)

### X. Background batch updating

A “scheduled task” has been added to the Interscope batch processing feature to periodically synchronize all linked projects. This synchronization process is the same as the user initiated synchronization except that it happens on a pre-defined schedule. During this process the planned and actual dates for linked milestones on ALL link projects are updated. In addition, the P6 cost data is updated for each project.

XI. Appendix A – Interscope Milestones

A. MILESTONE LISTING BY: PROJECT PHASE

PROJECT PHASE	MILESTONE	TAB	CODE
ADVERTISEMENT	Date of FIRST advertisement for designer	PRJ	DESADVPRJ
	Date of advertisement for commissioning authority	PRJ	CXADVPRJ
	Execute Commissioning Contract	PRJ	CXCONPRJ
	Advertise for CM at Risk	PRJ	CMADVPRJ
DESIGN CONTRACTS	RFP Letter Date	DC	RFPDC
	Designer Selection approved by Owner Agency	DC	DESSEDC
	Design Contract Agreement Date	DC	AGREEDC
	Date Signed by Designer	DC	SIGNDESDC
	Date Signed by Owner Agency	DC	DESCONDC
	SCO Acceptance Date	DC	ACCEPTDC
DESIGN REVIEW	Advanced Planning submittal to SCO	PKG	APSSCOPKG
	Advanced Planning approval by SCO	PKG	APASCOPKG
	Schematic Design Submitted to SCO (FIRST submittal)	PKG	SDSSCOPKG
	Schematic Design Approved by SCO (Final Approval)	PKG	SDASCOPKG
	Design Development Submitted to SCO (FIRST submittal)	PKG	DDSSCOPKG
	Design Development Approved by SCO (Final Approval)	PKG	DDASCOPKG
	Construction Documents Submitted to SCO (FIRST submittal)	PKG	CDSSCOPKG
	Construction Documents Approved by SCO (Final Approval)	PKG	CDASCOPKG
BIDDING AND CONTRACTS	Projected Bid Date	PKG	BIDOPENPKG
	Approved for Bid	PKG	BIDAPPRPKG
	Award Letter	PKG	AWDLTRPKG
	The date on the Construction Contract	CC	CONTRACTCC
	Construction Contract Execution	CC	CEMCC
CONSTRUCTION	Pre-Construction Conference	PKG	PCCNFPKG
	Construction Start	PKG	NTPPKG
	Beneficial Occupancy	PKG	BENOCCPKG
	Final Inspection	PKG	FININSPPKG
	Final Acceptance	PKG	FINACCPKG
CONSTRUCTION CLOSEOUT	Projected Completion	CC	COMPLETECC
	Final Report Submitted to SCO / Received by SCO	PKG	FRSSCOPKG
	Final Report Approved by SCO	PKG	FRASCOPKG
PROJECT CLOSEOUT	Final Approval - Last step of Closeout process	PKG	FINAPPRPKG
	Project Closeout	PRJ	CLOSEPRJ

Highlighted milestones are REQUIRED (17).

## B. MILESTONE LISTING BY: MILESTONE TAB

TAB	MILESTONE	CODE
PROJECT	Date of FIRST advertisement for designer	DESADVPRJ
	Date of advertisement for commissioning authority	CXADVPRJ
	Execute Commissioning Contract	CXCONPRJ
	Advertise for CM at Risk	CMADVPRJ
	Project Closeout	CLOSEPRJ
DESIGN CONTRACT	RFP Letter Date	RFPDC
	Designer Selection approved by Owner Agency	DESSELDC
	Design Contract Agreement Date	AGREEDC
	Date Signed by Designer	SIGNDESDC
	Date Signed by Owner Agency	DESCONDC
	SCO Acceptance Date	ACCEPTDC
PACKAGE	Advanced Planning submittal to SCO	APSSCOPKG
	Advanced Planning approval by SCO	APASCOPKG
	Schematic Design Submitted to SCO (FIRST submittal)	SDSSCOPKG
	Schematic Design Approved by SCO (Final Approval)	SDASCOPKG
	Design Development Submitted to SCO (FIRST submittal)	DDSSCOPKG
	Design Development Approved by SCO (Final Approval)	DDASCOPKG
	Construction Documents Submitted to SCO (FIRST submittal)	CDSSCOPKG
	Construction Documents Approved by SCO (Final Approval)	CDASCOPKG
	Projected Bid Date	BIDOPENPKG
	Approved for Bid	BIDAPPRPKG
	Award Letter	AWDLTRPKG
	Pre-Construction Conference	PCCNFPKG
	Construction Start	NTPPKG
	Beneficial Occupancy	BENOCCKPKG
	Final Inspection	FININSPPKG
	Final Acceptance	FINACCPKG
	Final Report Submitted to SCO / Received by SCO	FRSSCOPKG
	Final Report Approved by SCO	FRASCOPKG
	Final Approval - Last step of Closeout process	FINAPRPKG
	CONSTRUCTION CONTRACT	The date on the Construction Contract
Construction Contract Execution		CEMCC
Projected Completion		COMPLETECC

Highlighted milestones are REQUIRED (17).